

PRACTICE SETUP

Credentialing and payer enrollment checklist

An educational checklist of what clinicians commonly line up for credentialing and payer enrollment. Timelines vary; start early.

Educational example only. This is not legal, medical, or compliance advice, and it is not a ready-to-use legal document. Requirements vary by state, payer, and setting. Adapt anything like this to your own situation and have it reviewed by qualified legal and compliance counsel licensed in your jurisdiction before using it in a practice. You are responsible for compliance with all applicable federal and state laws, including HIPAA. shrinkiatry publishes professional commentary and education, not legal or medical advice.

Current as of July 7, 2026. Laws, payer rules, and billing codes change. Confirm the current requirements for your jurisdiction and setting before you rely on anything here.

Have ready

- Current CV with no unexplained gaps
- Active state license(s), DEA, and NPI
- Board certification or eligibility
- Malpractice certificate of insurance
- Education, training, and work history with contacts
- Professional references

The process

- Keep a CAQH profile complete and attested
- Apply to each payer network you want to join
- Track application dates and follow up; credentialing often takes months
- Diarize revalidation and expirables (license, DEA, board, COI) so nothing lapses

If you go cash-pay

You can skip payer credentialing, but you still need licensure, DEA, malpractice, and clean records. Consider offering superbills for out-of-network reimbursement.

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